

Research Article

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Beyond the Oligopoly: Scholarly Journal Publishing Landscapes in Latin America and Europe

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Abstract

Purpose: This study investigates the diversity of national scholarly journal publishing ecosystems in seven countries across Europe and Latin America: Argentina, Brazil, Colombia, Finland, Mexico, Poland, and Türkiye. It challenges the common perception that global scholarly publishing is dominated by international commercial publishers by examining national publishing structures beyond English speaking contexts.

Design/methodology/approach: Using ISSN Centre data and national sources, we analyse journal-level publishing structures rather than article- or citation-level outputs. Publishers were categorized according to their institutional and organizational characteristics. The analysis focuses on

active journals, defined as those with a recorded start year and no identified termination date. Journal coverage in Web of Science, Scopus, and OpenAlex was examined to assess how national publishing landscapes are represented in major bibliometric databases.

Findings: Educational institutions emerge as the primary publishers in most countries, representing more than 75 % of journals in Colombia and Brazil and more than 50 % in Mexico, Argentina, and Poland. Finland stands out, with scientific and professional associations leading journal publication at 62 %. Commercial publishers hold comparatively small shares, reaching their highest levels in Türkiye at 12.1 % and Poland at 8.2 %. In terms of database representation, OpenAlex indexes over half of the journals in most countries, whereas Web of Science (WoS) and Scopus cover only a small portion.

Research limitations: The study relies on ISSN and national datasets, which differ in completeness and standardization. Variations in national reporting practices and database indexing policies may influence coverage comparisons. As the analysis is based on currently active journals, historical trends reflect surviving journals only.

Practical implications: The results provide evidence for policymakers, database providers, and research evaluators to recognize the diversity of national publishing systems. They highlight the importance of improving data sources and analytical approaches to ensure more accurate assessment of scholarly communication outside heavily commercialized environments.

Originality/value: The study offers a comparative analysis of national journal publishing ecosystems across seven countries, revealing structural differences that challenge the assumption of a globally uniform publishing model. It underscores the need for bibliometric research frameworks that include and accurately represent national and regional publishing structures.

Keywords: journal publisher; scholarly publishing; database coverage; Latin America; Europe

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1 Introduction

Global scholarly publishing is frequently described as being dominated by a small group of multinational corporations, often referred to as the “oligopoly” (Butler et al. 2023; Larivière et al. 2015). Elsevier, Springer Nature, Wiley, Taylor & Francis, and more recently MDPI are usually presented as the main actors shaping the academic publishing landscape through market concentration. Elsevier also exerts control over bibliometric infrastructures, in the form of the Scopus database. This perspective has been widely documented in bibliometric research, policy reports, and open science debates.

However, this prevailing narrative is largely based on analyses of selective international indexes such as Web of Science (WoS) and Scopus. These sources privilege internationally visible and English-language journals (Alonso-Álvarez 2024; Céspedes 2021; Ma 2019; Maddi et al. 2025; Mongeon and Paul-Hus 2016; Salatino 2022; Singh et al. 2021; Van Leeuwen et al. 2001; Vera-Baceta et al. 2019), which obscures the diversity of publishing practices that exist outside commercial infrastructures (Khanna et al. 2022; Silva-Alés et al. 2025). As a result, significant segments of scholarly communication, particularly those embedded in national and regional contexts, remain underrepresented and overlooked in global debates.

Some recent analyses have shown that the vast majority of WoS-indexed journals are published by professional commercial publishers (Taşkın et al. 2025). Moreover, a report by the EU-funded DIAMAS project suggests that WoS considerably over-represents the share of journals published by commercial publishers, compared to journal lists compiled based on Ulrichsweb which is more inclusive in terms of content indexation (Taşkın et al. 2024). Van Bellen et al. (2025) have shown that the persisting stronghold of oligopoly publishers is indeed largely an artefact of the selective exclusiveness of databases like WoS. On the contrary, the more inclusive Dimensions database shows, according to van Bellen and colleagues, that the share of oligopoly publishers of the global output is actually decreasing.

This study contributes to the literature on the global publishing landscape by examining the journal ecosystems in seven countries in Europe and Latin America that exist beyond the commercial oligopoly and its publishing concentration. These seven national cases are: Argentina, Brazil, Colombia, Finland, Mexico, Poland, and Türkiye. Drawing on ISSN data and national sources, and complemented by OpenAlex, we analyse the roles of universities, learned societies, research institutions, and other actors in scholarly publishing. By focusing on publisher-level dynamics, we aim

to provide a more nuanced picture of how scholarly communication is sustained in non-commercial and multi-lingual environments, and to contribute to ongoing discussions about how bibliometric infrastructures can better reflect this diversity. Given the heterogeneity and incompleteness of available data sources, the estimation of the total number of journals should be understood as an approximation of the size of national journal ecosystems rather than a definitive count. In this study, we address the following research questions:

- How has the number of active journals evolved over time in the seven countries included in the study?
- What types of publishers operate in these countries, and how does their share of journals vary across different national contexts?
- To what extent is the publishing of scholarly journals in these countries concentrated among a few dominant publishers?
- What is the total number of scholarly journals published in the seven studied countries, and how are they covered in international and open bibliometric databases?
- How do the indexing rates of different publisher types vary across bibliometric databases?

It is important to note that this study analyses journals based on their country of publication rather than the country of author affiliation. This choice reflects a focus on editorial and publishing infrastructures rather than on research production, authorship, or knowledge flows. In most national contexts, a significant share of research outputs are published abroad. For example, in Finland, during 2018–2020 researchers affiliated with Finnish institutions produced 87,365 peer-reviewed publications, of which only 11.2 % appeared in outlets published in Finland. Among journal articles, the share of Finnish outlets was 7.9 % (Pölönen 2022). Our focus on national publishing ecosystems therefore reflects where journals are managed and sustained, rather than where authors publish their research. This distinction is crucial for interpreting the results and understanding the structural diversity of national journal systems.

1.1 The “Oligopoly” Narrative in Academic Publishing

Scholarly publishing is frequently described as being concentrated in the hands of a few large commercial firms, a situation often labelled the “oligopoly” (Butler et al. 2023; Larivière et al. 2015). The dominance of Elsevier, MDPI, Springer Nature, Wiley, and Taylor & Francis has been

examined in numerous bibliometric studies, policy analyses, and open science debates. However, this view is shaped largely by evidence from WoS and Scopus, databases that capture only part of the global landscape and overlook many publishing models led by universities, learned societies, and research institutes, sustained through public funding and academic volunteerism rather than commercial revenue. The development of more inclusive open databases, such as OpenAlex, has broadened the picture of journal publishing beyond commercial indexing systems. Limitations remain regarding DOI availability and coverage across regions and languages (Culbert et al. 2025). Analyses that draw on regional and national sources reveal a far more varied and plural publishing environment, particularly in non-English-speaking contexts where institutional and multilingual traditions continue to support diverse forms of scholarly communication (Armengou et al. 2023; Rico-Castro and Bonora 2023).

The concept of an oligopoly within scholarly publishing can be traced back to the late 1980s when librarians began documenting the disproportionate influence of a few publishers on serial budgets. Dougherty and Johnson (1988) showed how price increases by Elsevier, Pergamon, and Springer accounted for a large share of cost escalation, drawing analogies to the OPEC cartel. Hamaker and Grinell (1989) explicitly framed Elsevier, Springer, Pergamon, and Plenum as an oligopoly whose titles absorbed large budget shares despite representing a small fraction of subscriptions. Wilson (1990) identified systemic drivers of this crisis, including discriminatory pricing, currency fluctuations, and consolidation of smaller firms, with science and technology journals especially vulnerable. These early critiques positioned the oligopoly primarily as a pricing and budget problem.

From a historical perspective, De Silva and Vance (2017) document the shift from learned society publishing to an increasingly commercialized system, culminating in the rise of bundled “Big Deals” in the 1970s and 1980s (see also Fyfe et al. 2022). This consolidation set the stage for what bibliometric analyses later captured more systematically. The landmark study by Larivière et al. (2015), based on 45 million WoS records, showed that by 2013 five firms, Elsevier, Springer, Wiley-Blackwell, Taylor & Francis, and Sage, controlled more than half of global output covered by WoS, with the highest concentration in the social sciences.

More recent research highlights how the oligopoly has adapted rather than declined. Shu and Larivière (2024) demonstrate that open access broadened availability but did not reduce concentration. By 2020, MDPI, Springer Nature, Elsevier, Wiley, and Frontiers captured over 70 % of global revenues from article processing charges. Asai (2022) shows

that hybrid journal APCs remain inflated due to legacy subscription power. Moore (2020) argues that publishers now extend control beyond journals into submission systems, analytics, and infrastructures such as GetFTR, transforming scholarly communication into data-extractive platforms. Van Bellen et al. (2025) and Nishikawa-Pacher (2022) add nuance by showing how concentration appears extreme in selective databases like WoS but less so in inclusive platforms such as Dimensions, SciELO, Redalyc, Érudit, and Hrčak, which foreground the vitality of regional publishing circuits.

Regional and national studies reinforce and refine these contrasts. Neubert and Rodrigues (2021) relying on WoS, find that commercial publishers dominate Latin American STEM journals, whereas universities and scholarly associations sustain humanities and social sciences through diamond open access. Betz et al. (2025) highlight how Canadian libraries maintain hundreds of non-commercial diamond journals, viable yet precariously funded. Analysis of comprehensive national publication data from Finland by Pölönen et al. (2020, 2021a) suggests, in contrast to WoS (Larivière et al. 2015), that social sciences are as a field (together with the humanities) the least dominated by oligopoly publishers. These examples indicate that while the oligopoly is highly visible in global bibliometric databases, it does not fully displace local ecosystems that sustain alternative models of scholarly publishing.

Legal and normative critiques have further broadened the debate. Margoni et al. (2016) argue that oligopoly is not only an economic structure but also an intellectual one, as publisher control shapes evaluation and recognition systems. The operationalization of research excellence as outputs in international English language journals indexed in commercial databases promotes epistemological monoculture and discriminates researchers based on language (Amano et al. 2021, 2023, 2025; Bennett 2015; Kumar et al. 2024; Ramírez-Castañeda 2020). Open access and open science are therefore framed as counterbalances that can redistribute power by decentralizing both publishing and assessment. In addition, several initiatives for assessment reform call for metrics based on broader geographical, linguistic and disciplinary scope (Declaration of Principles 2022; Hicks et al. 2015) and recognition of diverse contributions to science and society irrespective of language (ARRA 2022; Helsinki 2019).

The literature shows that the oligopoly is multidimensional: historical, arising from subscription price crises and mergers; structural, reflected in bibliometric concentration; adaptive, extending into open access and infrastructures; and contested, as libraries, universities, and national platforms sustain bibliodiversity. These dynamics are further

shaped by three key mechanisms: the selectivity of major bibliographic databases, language and regional biases, and research evaluation systems that reinforce reliance on indexed journals. This study builds on that scholarship but also challenges its limitations. While bibliometric analyses of WoS and Scopus depict a concentrated global publishing market, they tend to reinforce these mechanisms rather than the full diversity of publishing practices. By analysing publishers across seven countries, Argentina, Brazil, Colombia, Finland, Mexico, Poland, and Türkiye, we aim to reveal how institutional and community-led publishing models continue to sustain diverse scholarly communication practices that remain largely invisible in selective databases.

1.2 Local, Multilingual and Regional Publishing Patterns

Early research on Latin American journals illustrates that the broader publishing landscapes have been studied for decades, showing how universities and government agencies, rather than commercial firms, historically sustained much of the region's publishing. Many titles lacked basic bibliographic control, underscoring both structural fragility and a strong reliance on academic institutions (Cano 1995). Comparable challenges in identifying and classifying peer-reviewed titles have been observed in global registries such as the ISSN portal and Ulrichs' Periodicals Directory, complicating assessments of national publishing systems (Laakso and Multas 2023). Over time, regional platforms such as SciELO and Redalyc institutionalized a public, diamond open access model grounded in editorial autonomy and community control (Beigel 2025; Minniti et al. 2018). Similar initiatives exist in Europe, where national lists maintained by research evaluation systems aim to comprehensively record scholarly journals within their borders (Pölonen et al. 2021a).

Open access has been a turning point more broadly, enabling universities and scholarly societies to launch low-cost journals, often via Open Journal Systems, and supporting south-south knowledge transfer in developing countries (Johnston 2009; Khanna et al. 2022; Nazarovets et al. 2026). Similar diversity is evident in Europe, where journals often publish in English and/or national languages. Comparative studies confirm that multilingualism continues to characterize SSH disciplines, though WoS and Scopus capture only a fraction of this output (Kulczycki et al. 2020; Mironescu et al. 2023). Country-specific studies have further enriched this perspective, including analyses of the Finnish system and Australian publishing practices (Jamali et al. 2022; Late et al. 2020), which show how national contexts shape

scholarly communication beyond the scope of international databases. In Poland, many scholars follow a dual track, publishing in English to gain international visibility and in Polish to serve national audiences and professional practice (Warchał and Zakrajewski 2024).

Other regional cases highlight distinct models. In Catalonia, government support and cultural policies revived Catalan-language publishing (Van Jacob and Vose 2010), while in Croatia the Hrčak portal anchors a diamond OA ecosystem sustained by public subsidies but vulnerable to resource constraints (Stojanovski and Mofardin 2025). In Japan and China, dual-language systems persist: English dominates internationally visible fields, yet national-language publishing remains essential for domestic audiences and disciplines (Li et al. 2024; Nishikawa et al. 2024). A multilingual ecosystem of independent journals, sustained by a collaborative approach, is also well-documented in Canada (Lange and Severson 2021; Paquin 2017; Van Bellen and Céspedes 2024). In both Canada and Finland, national journals provide outlets for research that is locally relevant and of interest to a broad range of users (Pölonen et al. 2020, 2021b; Van Bellen and Larivière 2024).

While national journals play a role in knowledge ecosystems, they also suffer from lesser recognition and sometimes poor reputation in terms of quality and impact. An analysis of web survey data collected as part of the Diamond Open Access Journal study highlighted concerns among journals from non-English speaking than English speaking countries with regards to indexation and visibility, peer-review management, sustainability and funding, dissemination, editorial workflow and skills and competencies (Yoon et al. 2025). A study of Libyan journals pointed out a contrast between high editor satisfaction and low discoverability, technical quality, and citation impact (Bredan et al. 2023).

The global landscape of journals outside the commercial databases is very broad, so it is important to avoid sweeping conclusions. Veretennik and Yudkevich (2023) find, analysing Russian and Eastern-European journals, that traditional journal metrics undervalue the quality of regional journals in Physics and Astronomy. Chavarro et al. (2018) conclude, indeed, that journals of “adequate editorial standards and scientific merit” remain excluded from WoS due to linguistic, geographic and disciplinary priorities. When entered into commercial databases, nationally oriented journals (especially those published in English) increase their citation impact and geographical scope (Moed et al. 2021) - likely an effect of database indexation than of improving editorial and peer-review practices.

These cases demonstrate that local and regional ecosystems are vital infrastructures in their own right. They

preserve multilingual traditions, sustain scholarly communities, and advance non-commercial publishing models, particularly diamond open access, that counterbalance the global dominance of large commercial firms. At the same time, important differences emerge across contexts. While Latin American systems are often characterised by strong regional platforms and coordinated open access infrastructures, European cases tend to rely more on national evaluation frameworks and institutional publishing arrangements. These shared features and structural contrasts provide a comparative foundation for analysing how national journal ecosystems are organised and represented in global databases.

2 Materials and Methods

This study examines the scholarly publishing landscape across seven countries by integrating data from multiple publicly available sources. Our methodological approach consists of three key stages: (1) compiling a comprehensive database of scholarly journals, (2) classifying publishers based on type of organisation, and (3) standardizing publisher names to ensure aggregation comparability. The dataset was constructed by consolidating ISSN metadata with records from bibliographic databases, applying rigorous deduplication procedures, and verifying publisher affiliations.

Given that the classification process required in-depth knowledge of national publishing systems and institutions, our research team included experts from each country who manually reviewed and standardized the data. The following subsections describe the data collection process, classification framework, and data processing techniques in detail.

2.1 Preparing the Database of Scholarly Journals

To analyse the scholarly journal landscape in the selected countries, we compiled a dataset integrating ISSN data and records from seven publicly available sources (Crossref, Bielefeld Academic Search Engine (BASE), Ulrich's Periodicals Directory, PKP (Public Knowledge Project), Scopus, JUFO (Finnish Publication Forum), and DOAJ [Directory of Open Access Journals]). The ISSN metadata used in the study were retrieved in March 2024, and all subsequent analyses were performed using this frozen dataset.

These sources were used to identify as many peer-reviewed journals in the countries as possible, for which uniform metadata was gathered from the ISSN Centre to

compile the final dataset. The dataset relies on ISSN-based and national registries, which primarily aim to include scholarly journals, although inclusion does not guarantee uniform editorial standards. A detailed description of the methodological approach used for constructing such datasets is provided in Laakso and Pölönen (2023), whose framework informed the data compilation process in this study. Journal records from multiple sources (including Crossref, BASE, and PKP) were integrated using ISSN and ISSN-L identifiers as primary matching keys. These sources were used to improve coverage and metadata completeness, while country attribution was based on ISSN Centre records and validated through national databases and expert review, ensuring consistency in country attribution. In contrast to large international databases, where country attribution can be ambiguous due to multinational publishing structures, the national journal lists used in this study are typically institutionally anchored, facilitating more consistent country assignment.

The initial exploration was based on ISSN listings, but the final selection of journals for the analysis was in most cases validated against national sources to accurately filter to currently active journals. This approach represents a key contribution of our study to the broader global discussion on data sources and their reliability. For Colombia, we included only journals indexed in the national Publindex database, as these are officially recognized scientific journals. In the case of Poland, we relied on ARIANTA, the most comprehensive and up-to-date national database of Polish scholarly journals. The situation in Argentina exemplifies the challenges we address: the national ISSN registry is severely outdated, prompting us to conduct an empirical survey to identify active scholarly journals (Beigel et al. 2022). In Finland, however, the analysis was directly based on the ISSN list. As a result, the final dataset contained 178,902 unique serials (globally, and 18,061 for the seven analysed countries), deduplicated based on their ISSN-L identifier.

Given that the sources we utilised primarily collect metadata on scholarly journals, we assumed that our database consists mainly of scholarly journals and is suitable for analysing the structure of the publishing landscape. Since journals appeared in multiple databases and ISSN-L was not always assigned alongside ISSN/EISSN, we applied an additional deduplication process: (1) each journal was assigned a unique identifier and dataset was transformed into a long format, where each identifier (ISSN-L, ISSN, EISSN) was stored in separate rows; (2) Journals sharing an identifier were grouped together to ensure that each journal appeared only once in the dataset.

We focused exclusively on active scholarly journals with clearly documented starting years and no identified

termination date. However, this working definition of an active journal does not guarantee that all journals included in the analysis and labelled as active actually published issues in 2023 or 2024 (see below further discussion of limitations of our study). As indicated in Table 1, the final dataset comprised 15,053 journals from seven countries with confirmed ISSNs and verified metadata, ensuring consistency across sources.

2.2 Classification of Publishers

To systematically analyse the academic publishing landscape, we categorized journal publishers using a structured classification model. Our study focuses on countries where at least one of the co-authors is affiliated, ensuring detailed knowledge of the local publishers.

As a starting point, each publisher was assigned to one of seven predefined categories, following the classification framework established by Latindex: (1) Scientific or professional associations, (2) Research institutions, (3) Independent editors, (4) Commercial publishers, (5) Educational institutions, (6) Governmental institutions, (7) International institutions. To maintain comparability across countries, the research team thoroughly discussed the classification categories and conducted calibration sessions before applying the classification scheme. Publisher classification was conducted using a combination of Latindex categories and country-specific knowledge within the research team. Ambiguous cases were resolved through iterative discussion among co-authors, following a set of guiding principles prioritising the primary institutional affiliation of the publisher. While this approach ensured consistency, it may not fully eliminate subjectivity in classification.

A key aspect of publisher classification was determining whether a journal was managed by a single organisation or in collaboration between multiple publishers. In this study, single publisher refers to records where only one

organisation is indicated as the publisher in MARC 21 field 260, with no additional publishers listed in field 720. Conversely, multiple publishers indicates that more than one organisation is mentioned in field 260 and/or field 720. Table 2 presents the number of unique publishers and the share of journals published by a single publisher versus those managed by multiple publishers in each country. The results show that, in most countries, single-publisher journals dominate, comprising 94.48 % of all analysed journals.

Subsequently, we assigned a final classification to each journal, considering cases where multiple entities were responsible for publishing a journal. To account for these collaborative cases, we introduced four additional categories: (8) Commercial and other(s), (9) Educational and other non-commercial(s), (10) Governmental institutions and other non-commercial(s), (11) Other composition of non-commercial publishers.

2.3 Standardization of Publisher Names

To analyse publishing concentration accurately, we standardized publisher names within each country. Since ISSN metadata often contains inconsistencies, such as duplicated variations between different records for the same organisation due to minor spelling differences or multiple languages used, formatting discrepancies, or multiple institutions grouped within the same metadata field, manual standardization was required to ensure data accuracy and comparability across countries.

The standardization process was carried out manually by the co-authors responsible for each respective country, leveraging their expertise and familiarity with the local publishing landscape. Using ISSN metadata from fields 260, e_260, 710, e_710, 720, and e_720, each researcher reviewed and harmonized publisher names to eliminate redundancies

Table 1: Number of active unique journals per country.

Country	Number of journals
Argentina	1,253
Brazil	5,640
Colombia	428
Finland	387
Mexico	777
Poland	3,134
Türkiye	3,434
Total	15,053

Table 2: Number of publishers and share of journal publishers by single and multiple entities per country.

Country	N of publishers	Single publisher journals	Multiple publishers journals
Argentina	613	100.00 %	0.0 %
Brazil	2,013	100.00 %	0.0 %
Colombia	168	97.90 %	2.10 %
Finland	333	91.21 %	8.79 %
Mexico	397	89.83 %	10.17 %
Poland	1,739	85.77 %	14.23 %
Türkiye	2,218	96.42 %	3.58 %
Total	7,481	94.45 %	5.55 %

and unify institutional variations. This expert-driven approach was essential for maintaining the integrity of the dataset, as automated methods would have been insufficient to account for the nuances of national publishing systems.

The number of institutions linked to each journal varied significantly across countries due to differences in how ISSN databases structure their metadata. In Poland, journals had an average of 5.96 institutions recorded per journal, whereas in Brazil, this number was much lower, at 1.80 institutions per journal. These differences reflect the diverse ways in which national ISSN centres register publisher affiliations.

For journals published by educational institutions, we adopted a standardized approach: all journals affiliated with faculties or departments of a given university were consolidated under the parent university. This decision prevented artificial fragmentation of university publishers and guaranteed greater consistency in the classification process.

To calculate the share of publishers by the number of journals, we first identified the unique publishers. Each publisher was categorized based on the number of journals they publish, using the following bins: 1 journal, 2 journals, 3–5 journals, 6–10 journals, and more than 10 journals. We then computed the percentage of publishers in each category within a given country by dividing the number of publishers in each bin by the total number of publishers for that country.

2.4 Analysis and Visualization

The analytical phase of this study consisted of several complementary steps aimed at describing the structure and composition of national journal publishing ecosystems. After completing the data integration and publisher classification processes, we conducted descriptive and comparative analyses focusing on four dimensions: (1) temporal evolution of active journals, (2) distribution of publisher types, (3) publishing concentration based on the number of journals per publisher, and (4) database coverage in Web of Science, Scopus, and OpenAlex.

Journal matching across data sources was performed using ISSN and ISSN-L identifiers as the primary linking keys. This ensured that each journal was uniquely identified even when metadata varied across databases. In cases of inconsistent or missing ISSN-L values, matching was validated manually through title normalization and publisher name verification. The matching and database coverage checks were completed in January 2025, and all subsequent analyses were based on this frozen dataset.

To assess temporal trends, founding years were aggregated by country and decade. The distribution of publisher

categories was analysed using frequency and percentage calculations, followed by cross-country comparisons. Publisher concentration was estimated based on the number of journals managed by each publisher, with publishers grouped into size categories (1, 2, 3–5, 6–10, and more than 10 journals).

All visualizations were produced using Python with figures illustrating cumulative journal growth, publisher category distributions, and database coverage across countries. The charts were designed to emphasize both national contrasts and shared structural patterns within Latin American and European contexts.

Finally, database coverage analysis relied on the presence of ISSNs across WoS, Scopus, and OpenAlex records. Journals were matched by ISSN-L to avoid double counting of print and electronic ISSNs. Coverage was calculated as the share of journals in each national dataset indexed in the respective databases.

These analytical procedures provide the empirical foundation for the results section, ensuring transparency, temporal clarity, and reproducibility in the interpretation of publishing system dynamics across the seven studied countries.

2.5 Limitations of the Study

We would like to acknowledge several limitations of this study that should be considered when interpreting the findings. These limitations stem primarily from the nature of the data sources, methodological choices, and the scope of our analysis.

The quality and consistency of data from the ISSN Centre depend on national agencies, which may lead to significant variations between countries. Differences in data registration practices and levels of completeness can impact the accuracy of journal metadata, including the number and type of organizations identified as publishers. This heterogeneity introduces a degree of uncertainty when comparing national publishing landscapes.

Our definition of active journals, those with clearly documented starting years and no identified termination date, does not necessarily imply that all journals classified as active have recently published issues. Some journals may remain listed as active despite a lack of recent publications, particularly in cases where formal deactivation is not recorded in databases. This limitation is inherent to studies based on registry data rather than direct verification of journal activity. In addition, the analysis of founding years is subject to survivorship bias, as it includes only journals that are currently active and does not capture discontinued titles.

Furthermore, the use of journal counts as the primary unit of analysis does not account for differences in publication volume, readership, or scholarly influence across journals. These limitations should be considered when interpreting patterns of concentration, as the absence of dominance in journal counts does not necessarily imply a lack of concentration in terms of output or impact.

The dataset includes journals identified through ISSN-based registries and national sources, which do not uniformly apply quality criteria such as peer review practices or editorial standards. The inclusion of a journal in these registries therefore does not imply a uniform level of editorial quality or adherence to best publishing practices. Accordingly, the analysis presented in this study reflects the structure of publishing infrastructures rather than a curated set of quality-assured journals.

The classification of publisher categories, despite extensive discussions among co-authors, posed challenges typical of such exercises. While key distinctions between educational institutions, learned societies, and commercial publishers could be applied fairly consistently, certain categories were more ambiguous and required context-sensitive decisions. For example, in Poland, numerous scholarly journals are published by local governments or museums, which are not standard academic publishing entities. After deliberation, we categorized these journals under Research Institutions to maintain consistency across the dataset. While this approach enhances comparability, it may differ from classifications used in other bibliometric analyses.

In addition to ISSN data, we incorporated supplementary national databases, such as Publindex (Colombia) and ARIANTA (Poland), and empirical surveys (Argentina) to improve data coverage and accuracy. However, the availability and comprehensiveness of such resources vary significantly across countries. Some countries lack equivalent national registries, leading to potential underrepresentation of their journal ecosystems in our dataset.

The selection of countries analysed in this study was guided by the expertise and research backgrounds of the co-authors. While this ensured in-depth knowledge of national publishing systems, it also introduced a selection bias. Our study covers only a limited number of European and Latin American countries, and we deliberately refrained from making broad generalizations about entire regions. A more comprehensive global analysis would require expanding the dataset to include additional national publishing systems.

Our study investigates and compares national journal landscapes and publisher types at the level of journals rather than at the level of outputs. While the output level analysis could provide more refined results on publisher concentration,

the data on article output is not available for all countries and journals included in the analysis.

The database matching and coverage checks were completed in January 2025. Because bibliographic databases, particularly OpenAlex, frequently update and expand their coverage, the number of indexed journals may have changed since the time of analysis. The figures reported in this study therefore reflect a fixed dataset captured at that point in time. As registry-based data are continuously updated, the dataset represents a temporal snapshot rather than a definitive record of journals active in any single calendar year.

Finally, this study focuses on the structural characteristics of scholarly journal publishing, including publisher types and database coverage. It does not examine other important dimensions, such as disciplinary composition, open access status, or language diversity. While these factors are crucial for understanding scholarly communication, they require specialized metadata that is not uniformly available across the studied countries. Future research should address these aspects to provide a more holistic view of the journal publishing landscapes in these countries.

Despite these limitations, we believe that our study offers valuable insights into national scholarly publishing ecosystems through the lenses of publishers that are often overlooked in international bibliometric analyses.

3 Results

This section presents an analysis of the scholarly journal landscape across the seven studied countries, focusing on three key aspects: trends in the founding of new journals, the categorization of publishers, and publisher concentration.

3.1 Trends in the Founding of New Scholarly Journals

The analysis of the founding years of scholarly journals active up to now across the seven studied countries reveals significant differences in the development of national publishing landscapes. While the first journals in these countries appeared as early as the 19th century, their growth remained slow until the mid-20th century. Brazil, Finland, and Poland had individual journals already in the 19th century, whereas Türkiye, Colombia, and Mexico experienced more noticeable development at a later stage. Poland shows a consistent emergence of new journals since the late 19th century (Kulczycki et al. 2019), indicating a relatively stable publishing tradition.

As Figure 1 shows, following World War II, a distinct but slow growth in the number of newly founded journals

became evident, and accelerated first in Poland and from the 1970s onwards also in Brazil. This growth can be linked to the post-war reconstruction of academic institutions, increasing investment in scientific research, and the expansion of higher education systems.

A more pronounced expansion occurred from the 1990s onwards. Brazil, Poland, and Türkiye witnessed a rapid increase in the number of journals, albeit driven by different underlying dynamics. In Poland, the increase was closely tied to the post-socialist transformation and integration into the global research economy, which intensified the pressure to publish in internationally indexed journals. Türkiye's expansion, while similarly notable, has been shaped by the volatile and often rapidly changing structure of its research evaluation system, which increasingly privileges quantifiable research outputs. As Şener et al. (2025) argue, metric-based evaluation frameworks in Türkiye and Colombia have acted as gatekeeping mechanisms, particularly affecting early-career researchers and fostering a journal proliferation geared toward meeting formal productivity indicators rather than long-term editorial sustainability. Mexico also exhibited upward trends during this period, albeit at a slower pace than Brazil and Türkiye.

The remarkable increase in the number of scientific journals in Brazil, from just over a hundred in the 1970s to more than 5,000 today, is closely linked to the expansion of the national graduate education system and research output.

Since the creation of the National Graduate System in 1974, Brazilian universities and research groups have grown significantly, generating a demand for more publication outlets. At the same time, the evaluation policies of agencies such as CAPES encouraged scientific production, motivating universities and scientific societies to launch their own journals to disseminate research and strengthen academic communities in different fields. This growth was further reinforced by structural factors, including the barriers Brazilian researchers initially faced in publishing internationally, the global movement toward open access, and, especially, the pioneering role of SciELO, which increased the visibility and credibility of national journals. Combined with the pressures of the “publish or perish” culture, these dynamics transformed the Brazilian scientific landscape, making it one of the countries with the largest number of open-access journals worldwide.

The 21st century marked the most dynamic phase of journal expansion in nearly all the studied countries, as shown in Figure 2. The surge in new journal foundations after 2000 can be attributed to the rise of open access initiatives, such as SciELO (established in Brazil in 1998), Redalyc (launched in Mexico in 2003), and the Directory of Open Access Journals (founded in 2003), as well as to the widespread digitization of publishing workflows and the growing influence of research evaluation systems that increasingly reward publication volume. Brazil, Türkiye, and Poland recorded the most substantial increases, while

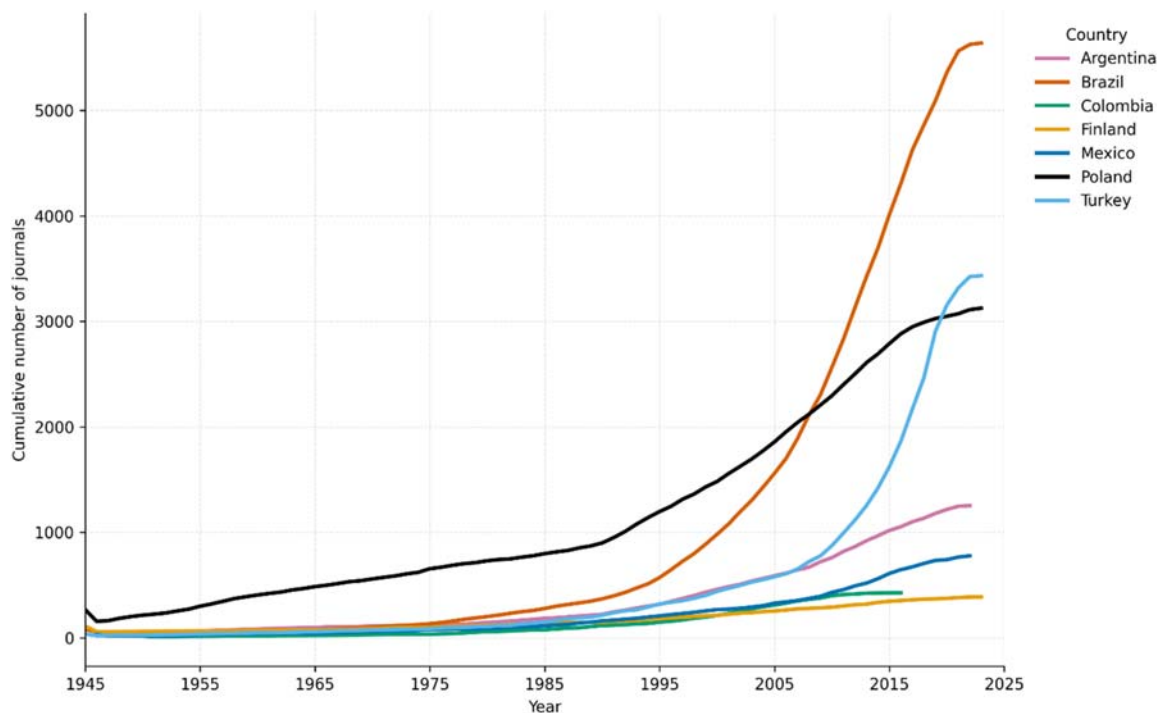


Figure 1: Cumulative number of (active up to now) scholarly journals across countries.

Mexico and Finland showed a more moderate yet steady rise. In Türkiye, the period after 2010 witnessed an especially sharp increase, which coincided with major reforms in higher education and a shift toward performance-based academic evaluation criteria, as documented by (Şener et al. 2025). These reforms incentivized institutional actors and independent editors alike to launch new journals as a means of navigating the metrics-oriented publishing environment.

However, it is noteworthy that this expansion trend appears to have peaked. In all countries, the number of newly founded journals per year has declined since around 2010, suggesting a saturation point or a structural shift in the scholarly publishing ecosystem. While part of this decline may be due to delays in the registration of new journals with the ISSN system, particularly for recently established titles, the downward trend is pronounced and consistent across the countries examined. This suggests, possibly, that the expansion of the national research and higher education systems is slowing down. In addition, national journal publishing systems may be entering a phase of consolidation or increased selectivity and demand for international publishing, potentially driven by stricter quality control, resource limitations, or the maturation of national publishing infrastructures. While our study focuses on active journals and does not systematically track discontinued titles, future research might explore whether this decline correlates with an increase in journal closures, offering further insights into the lifecycle of scholarly journals within different national contexts.

When examining the distribution of founding years for active journals, we observe a clear temporal shift in journal creation. Across most countries, approximately 25 % of currently active journals were established before 1980, another 25 % between 1980 and 1999, and an additional 25 % between 2000 and 2009. This means that roughly 75 % of all active journals were founded before 2010, with the remaining 25 % emerging in the most recent decade. The most striking growth was observed in Brazil and Türkiye, reflecting a strong expansion of their academic publishing ecosystems in the 21st century. In contrast, Finland and Colombia showed a more balanced and gradual trajectory, with a smaller share of their current journals established after 2000.

3.2 Categories of Publishers

Figure 3 illustrates that the distribution of journal publishers across different categories varies significantly among the analysed countries. However, what should be highlighted here, in all except one country, the dominant category of publisher (when analysed, the overwhelming majority of journals published by single publishers) is educational institutions.

The highest share of educational institutions is observed in Colombia, where they are responsible for 87.4 % of journals, followed by Brazil (76.6 %), Mexico (68.3 %), and Argentina (59.8 %). While educational institutions are the most frequent publisher type also in Türkiye (37.9 %) and Poland (46.2 %), their share is smaller in Europe. In contrast, their presence in Finland is much smaller (19.4 %), as other entities take the lead.

Scientific or professional associations play a particularly important role in Finland, where they publish 62.0 % of all journals, making them the largest publisher category in the country. This is likely linked to the unique support for learned societies and their publishing activities through a national umbrella organisation, the Federation of Finnish learned Societies (Late et al. 2020). Peer-reviewed publication series published by universities have never had a strong presence in Finland, with the learned societies being the nodes connecting together the departments from the individual universities around the country. Societies are the second largest category of publishers in Argentina (22.8 %), Poland (16.5 %), Brazil (11.6 %), and Mexico (9.7 %). Also in Türkiye their share of journals is relatively large (15.4 %), suggesting that professional organizations remain key actors in scholarly publishing across different regions.

Commercial publishers hold the highest (although small) share in Türkiye (12.1 %) and Poland (8.2 %), where private-sector entities are relatively more engaged in academic publishing. This contrasts with Finland (1.6 %), Colombia (0.2 %), and Mexico (2.5 %), where commercial entities have a much smaller presence. Argentina (4.07 %) and Brazil (6.5 %) also show a relatively low share of commercial publishers, indicating a stronger reliance on publicly funded or non-commercial models.

Independent editors, who typically represent individual scholars or small publishing initiatives, play a highly significant role in Türkiye, where they are responsible for 27.3 % of all journals. This level of independent publishing is unmatched in the other analysed countries, where their presence is marginal (Argentina 1.7 %, Mexico 1.5 %, Brazil 0.9 %, Poland 0.3 %, and Finland 0.26 %), or nearly non-existent (Colombia 0 %). In the Turkish context, these independent editors are often affiliated with universities but manage and publish journals outside formal institutional structures. While this model fosters editorial autonomy and responsiveness to niche scholarly communities, it also raises concerns about sustainability. Since such journals often depend heavily on the personal initiative of a single academic editor, they may face discontinuation if the editor steps down or institutional support is lacking.

Governmental institutions have varying levels of influence, with Argentina (5.02 %), Brazil (3.8 %), Mexico (6.1 %), Colombia (3.3 %), Poland (2.4 %), and Türkiye (2.4 %)

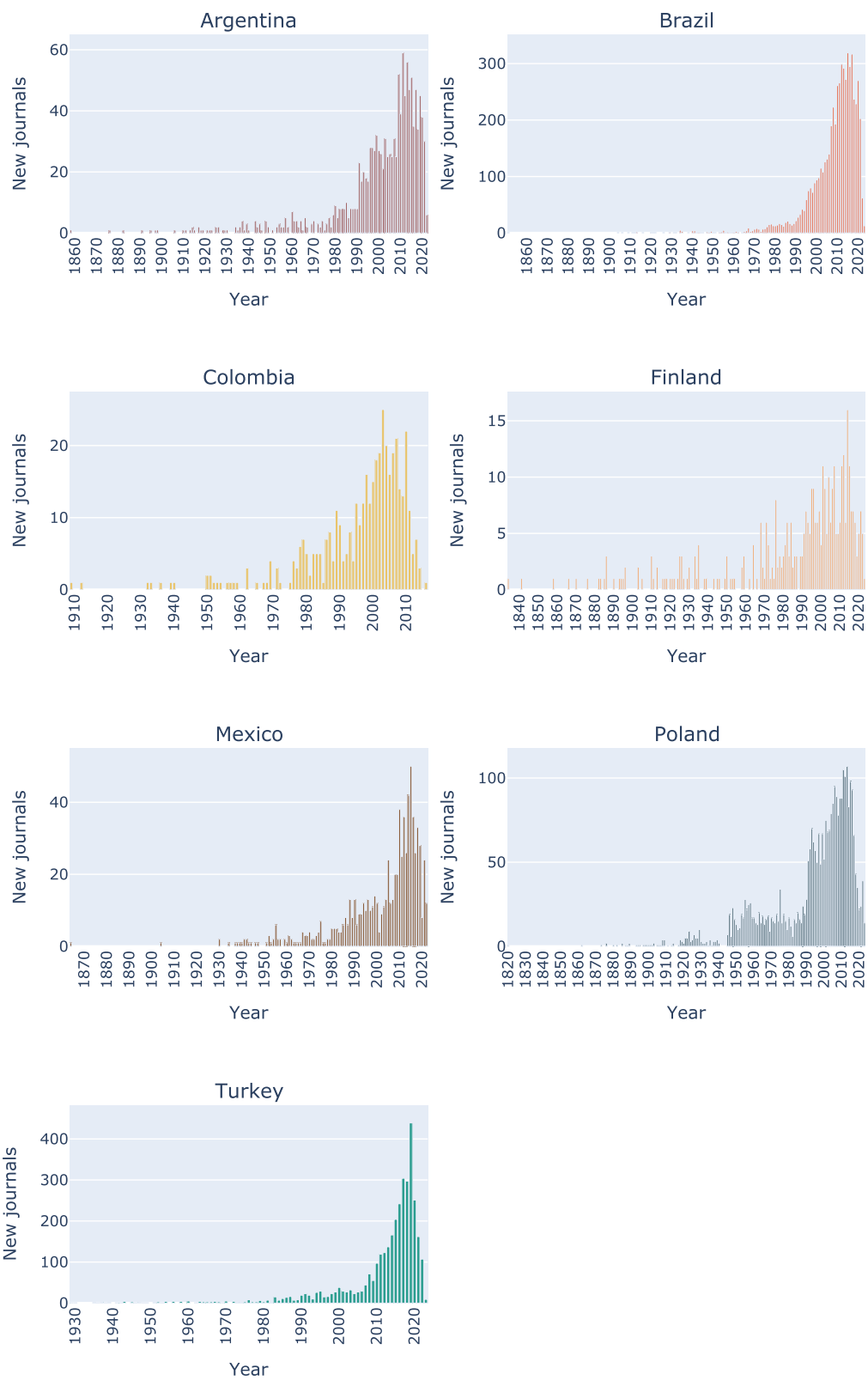


Figure 2: Number of new scholarly journals founded each year by country.

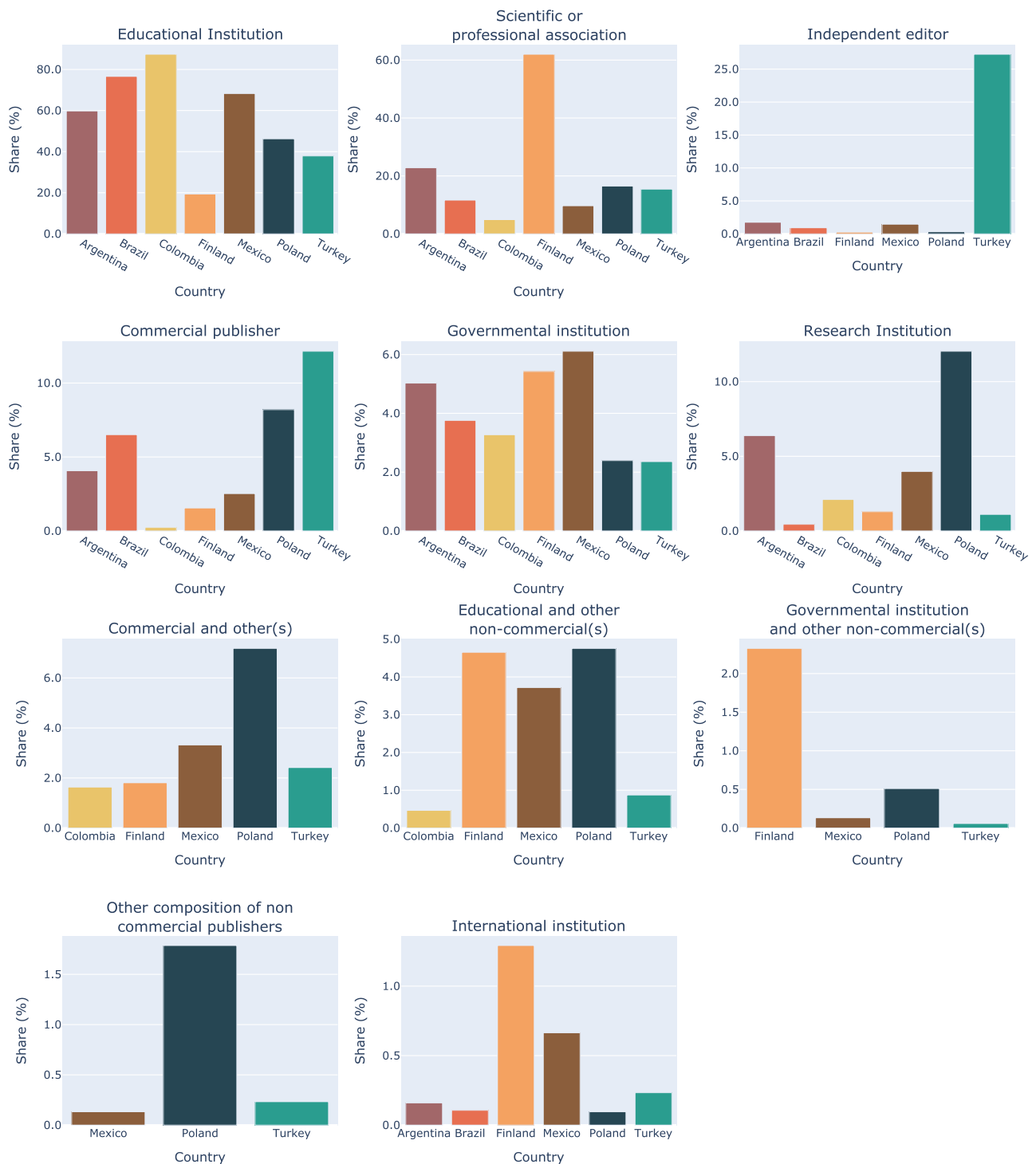


Figure 3: Share of journals published by publisher category per country.

maintaining some degree of government-led publishing. In Finland, this figure rises slightly to 5.4 %, reflecting a stronger role of state-affiliated journals.

International institutions do not play a major role in any country. Their share in Poland is 0.1 %, Mexico (0.7 %),

Brazil (0.1 %), and Finland (1.3 %). Research institutions show a particularly strong presence in Poland (12.0 %), where they publish a significant portion of the country's scholarly journals. This category also has a moderate presence in Argentina (6.38 %), Mexico (4.0 %), but remains

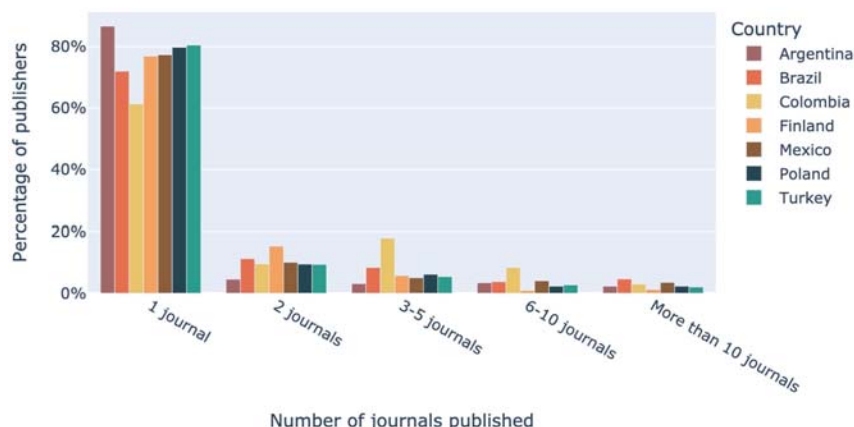


Figure 4: Share of publishers according to the number of journals in their national portfolio across countries.

less prominent in Brazil (0.4 %), Türkiye (1.1 %), and Colombia (2.1 %).

Other combinations of publishers' collectives, such as "Governmental institutions and other non-commercial publishers," have their strongest representation in Brazil (3.8 %) and Mexico (0.1 %), highlighting collaborative publishing efforts between public and private entities.

The data reveals distinct national publishing ecosystems. Colombia and Brazil are heavily dominated by educational institutions, while Finland relies on scientific or professional associations. Türkiye presents an unusual model, with a large share of independent editors. Poland and Mexico feature a more diversified publishing environment, balancing commercial publishers, educational institutions, and professional associations.

3.3 Publisher Concentration in Non-Commercial Scholarly Publishing

The distribution of publishers by the number of journals they produce varies significantly across the analysed countries, reflecting different levels of concentration within the academic field rather than a reflex of the commercial market. As seen in Figure 3, the share of commercial publishers remains limited. Following a Bourdieusian perspective, academic publishing can be understood as a structured space of positions shaped by relations among universities, research institutions, and other actors, where struggles revolve around recognition, legitimacy, and the accumulation of symbolic capital (Padmalochanan 2025). In this context, publishing is crossed through broader circuits of recognition that operate at multiple scales, including institutional, national, and international levels. Among these circuits, the so-called "mainstream" or "high-impact" journals have been progressively passed to the property of

commercial publishers to such an extent this introduced increasing degrees of interventions of commercial publishing actors into the value regimes of academia (Beigel 2021).

Figure 4 shows that most publishers in all the national cases observed in this paper operate only a single journal, indicating a highly fragmented configuration of this space. However, this fragmentation should not be interpreted as the absence of structure, but rather as an expression of the heterogeneity of academic publishing, where multiple forms of legitimation and diverse publishing circuits coexist. In Argentina, Türkiye, and Poland, small-scale publishers dominate. In the first, nearly 87 % of publishers produce only one journal, the highest proportion among the studied countries. Similarly, in Türkiye and Poland, around 80 % of publishers manage a single journal, reflecting a dispersed structure anchored in universities and public institutions.

In contrast, Brazil and Colombia exhibit a lower proportion of single-journal publishers, at approximately 72 % and 61 %, respectively. This indicates a more institutionally aggregated configuration, where large universities host numerous journals. However, such aggregation reflects the position of these institutions within the academic field rather than a form of concentration within the academic field. Unlike commercial oligopolies, where dominance is driven by economic capital, the concentration observed here is tied to the accumulation of symbolic and cultural capital within the field, and to the role of these universities as central agents in the organization of knowledge production and dissemination (Padmalochanan 2025).

The coexistence of numerous single-journal publishers alongside major institutional publishers illustrates the presence of multiple academic trajectories with scholars developing diverse orientations and agendas. These multi-scale circuits provide alternative pathways for prestige-building and knowledge circulation, particularly in non-hegemonic contexts, where local, national or regional forms

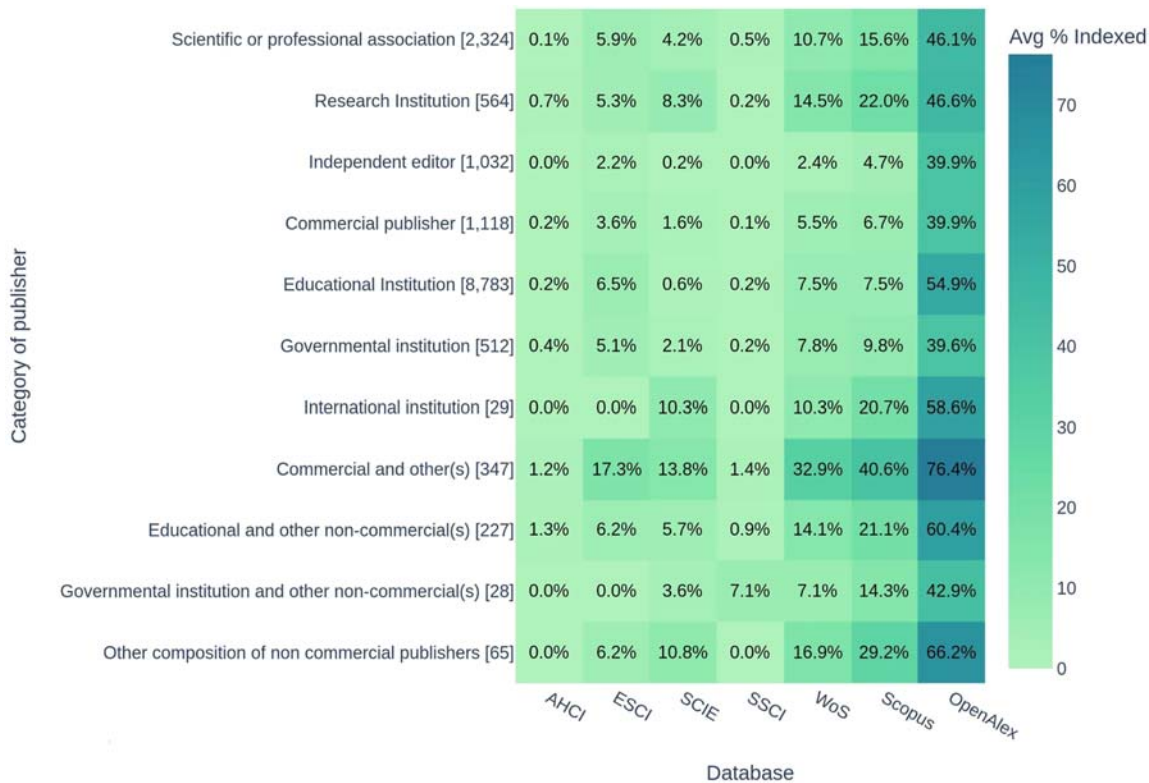


Figure 5: Share of journals indexed in databases by publisher category. The number of journals in each category is indicated in square brackets.

of recognition remain significant alongside global ones (Beigel 2021). Accordingly, the observed patterns should be interpreted as indicative of a structurally heterogeneous space crossed by specific national field dynamics that cannot be reduced to a commercial industry.

This multi-layered structure becomes more visible when considering medium-sized publishers. Those managing three to five journals are particularly prominent in Colombia, representing almost 18 % of the country's publishers, the highest share among the analysed countries. In Finland, this group accounts for nearly 6 % of publishers, while in Mexico and Poland it represents around 5–6 %. Rather than indicating a tendency towards concentration, these mid-sized actors reinforce the diversity of publishing circuits by occupying intermediate positions within the field, bridging highly localized publishing practices and more institutionally consolidated structures.

Despite the predominance of single-journal and medium-size institutional publishers, a small share of publishers in all countries operate at a much larger scale, producing more than 100 journals. The highest share of these large publishers is found in Brazil (4.7 %), followed by Mexico (3.5 %) and Colombia (3 %). In Finland and Türkiye, this group accounts for approximately 1–2 % of publishers, while Poland and Argentina report slightly lower shares, at around 2.3 %. Although these

actors may appear structurally similar to large commercial publishers, their role within the field differs fundamentally, as their scale is typically rooted in institutional accumulation rather than commercially driven expansion. Consequently, even the presence of large publishers does not imply a unified oligopolistic market, but rather reflects the stratified and heterogeneous nature of the scholarly publishing field.

3.4 Database Coverage

The analysis of database coverage (Table 3) shows substantial variation in the indexing rates of journals across the seven studied countries. WoS databases (AHCI, ESCI, SCIE, and SSCI) index only a small fraction of the national journal landscapes. The highest overall coverage in WoS is observed in Colombia (28.74 %), followed by Poland (11.42 %) and Mexico (10.04 %), while the lowest coverage is in Finland (4.65 %) and Brazil (6.15 %). The particularly high share of Colombian journals indexed in WoS may reflect the effects of national policy rather than solely the result of database selection. Although our dataset for Colombia includes only journals listed in Publindex, it is important to note that Publindex itself is shaped by national science policy, which explicitly encourages journals to be indexed in WoS and

Table 3: Share of journals indexed in each database (index).

Country	N of journals	AHCI	ESCI	SCIE	SSCI	WoS	Scopus	OpenAlex
Argentina	1,254	0.24 %	6.78 %	1.12 %	0.24 %	8.30 %	7.26 %	44.37 %
Brazil	5,640	0.20 %	4.40 %	1.44 %	0.18 %	6.15 %	6.60 %	53.24 %
Colombia	428	0.70 %	25.93 %	1.64 %	0.70 %	28.74 %	26.87 %	91.12 %
Finland	387	0.26 %	1.29 %	2.58 %	0.78 %	4.65 %	9.82 %	24.03 %
Mexico	777	0.26 %	5.92 %	2.83 %	1.03 %	10.04 %	12.74 %	58.30 %
Poland	3,134	0.32 %	6.54 %	4.37 %	0.29 %	11.42 %	17.84 %	49.04 %
Türkiye	3,434	0.20 %	6.09 %	0.96 %	0.23 %	7.45 %	7.80 %	48.75 %
All countries	15,053	0.25 %	6.04 %	2.02 %	0.29 %	8.53 %	10.24 %	51.19 %

^aPercentages are calculated based on the total number of journals in each country.

Scopus. ESCI has the highest inclusion rate among WoS databases, particularly in Colombia (25.93 %), suggesting that many journals are recognized as emerging sources but have not yet reached the core citation indexes (SCIE/SSCI). This pattern may reflect not only national evaluation policies that promote inclusion in international indexes, but also the regional development strategies of WoS itself.

In contrast, Scopus exhibits slightly broader coverage, with the highest representation in Colombia (26.87 %), Mexico (12.74 %), and Poland (17.84 %), while Brazil (6.60 %), Argentina (7.26 %), Türkiye (7.80 %), and Finland (9.82 %) remain below 10 %. However, the most extensive coverage is provided by OpenAlex. Most journals are indexed in this database in most countries, with particularly high representation in Colombia (91.12 %), Mexico (58.30 %), and Brazil (53.24 %). In contrast, Argentina (44.37 %), Türkiye (48.75 %), and Poland (49.04 %) fall just below the 50 % mark, while Finland has a substantially lower coverage (24.03 %). These patterns highlight the role of OpenAlex in capturing a more diverse and locally relevant scholarly output, particularly in Latin America. At the same time, it is important to note that a substantial share of journals remains outside OpenAlex coverage. This may be related to structural factors such as the absence of DOIs, incomplete or inconsistent metadata, and limited integration of some national publishing platforms into global indexing infrastructures. As a result, while OpenAlex provides broader coverage than selective databases, it does not yet fully capture the diversity of national publishing ecosystems, particularly for smaller or locally oriented journals.

The heatmap in Figure 5 further illustrates database coverage, categorized by publisher type. The results reveal that commercial publishers and international institutions have the highest indexing rates across all databases, particularly in Scopus and OpenAlex. In contrast, educational institutions, the dominant journal publishers in most countries, exhibit lower inclusion in WoS and Scopus but relatively high representation in OpenAlex (54.9 %).

Similarly, scientific or professional associations (2,324 journals) have moderate indexing rates in ESCI and Scopus but stronger presence in OpenAlex (46.1 %).

Independent editors and governmental institutions have significantly lower representation in international databases, with indexing rates often below 10 % in WoS and Scopus. The lowest coverage is observed for governmental and non-commercial collectives, highlighting their marginalization in global citation databases.

4 Discussion and Conclusions

Our findings contribute to challenging the prevailing narrative that a few commercial publishers dominate scholarly publishing globally. Prior analyses based on selective indexes reinforced the perception of an oligopoly, yet examining diverse national contexts reveals a more plural reality. In the seven countries studied, universities, research centres, and learned societies remain the primary publishers, showing that local academic communities sustain extensive journal ecosystems often overlooked in WoS and Scopus.

National and institutional publishing models are particularly visible in Latin America, where public universities and research institutes publish most journals, exceeding three quarters of titles in Brazil and Colombia. Argentina and Mexico also rely heavily on universities and scientific councils. In Europe, Finland illustrates a learned society-driven model, supported by the open access publishing platform (Journal.fi) and recognition of national journals (Publication Forum), while Poland combines universities, societies, and research institutes. Türkiye is distinct, with a strong presence of independent academic editors and a comparatively larger commercial sector. These contrasts underline how evaluation systems, policies, and academic cultures shape publishing structures.

Comparing regions highlights both differences and commonalities. Latin America is rooted in publicly funded,

institutionally managed journals, while European countries such as Finland emphasize professional associations. Despite these variations, both traditions privilege academic autonomy and non-commercial models, creating robust alternatives to oligopoly-driven publishing.

A crucial element of this study was the use of a Latindex-based classification system. Its fine-grained taxonomy made it possible to identify the prominence of non-commercial publishers, demonstrating how regionally informed frameworks improve global analyses of publishing diversity.

The dominance of educational and society publishers also speaks to issues of quality and autonomy. In Latin America and Europe, national journals often depend on public funding and volunteer editorship, embedding editorial decisions within universities and associations rather than commercial firms. This sustains quality through institutional credibility and aligns with Beigel (2025), an account of a “parallel value system” prioritizing academic independence. While such journals face challenges of infrastructure and visibility, their academic legitimacy remains strong.

Policy environments strongly influence publishing trajectories. Colombia’s Publindex has long tied journal recognition to WoS and Scopus inclusion, explaining the country’s relatively high coverage in these indexes. Argentina and Mexico have prioritized open access and regional indexing through SciELO, Latindex, and Redalyc, encouraging local visibility over global prestige metrics (Beigel et al. 2022). Brazil’s commitment to SciELO exemplifies how national platforms can provide quality assurance and international visibility outside commercial channels. These policy choices demonstrate that publishing outcomes are shaped not only by culture or economics, but also by evaluation frameworks and state strategies.

Database comparisons reveal further structural biases. WoS and Scopus index only a small fraction of national journals, while privileging English-language and commercially published titles. In contrast, OpenAlex indexes more than half of the journals in most countries, and over 90 % in Colombia. The discrepancy shows how reliance on selective databases underrepresents non-commercial publishers, especially universities, and reinforces the perception of scholarly ecosystems’ dependence on oligopoly publishers. Broader infrastructures such as OpenAlex help correct this imbalance by revealing the scale of institutionally based publishing.

While this study provides detailed insights into publisher types and database coverage, it does not examine differences across disciplines or languages. Metadata on subject areas were not consistently available in national sources, which limited the feasibility of a systematic

disciplinary analysis. Future research could extend our approach by analysing disciplinary patterns within national publishing ecosystems, particularly in the social sciences and humanities where non-commercial publishers are most prominent. Such analyses would further illuminate how publisher types and evaluation systems interact with disciplinary traditions and research agendas.

Together, these findings have clear implications. For research, they underline the importance of integrating national and regional sources into bibliometric analyses to capture the full diversity of scholarly communication. For policy, they caution against evaluation systems tied narrowly to WoS or Scopus, which risk marginalizing locally relevant journals. Examples such as Finland’s Publication Forum and Latin America’s indexing platforms show how inclusive systems can recognize diverse outputs. More pluralistic approaches to research evaluation would reduce structural biases and support bibliodiversity.

In conclusion, scholarly publishing in Latin America and Europe is more varied and institutionally grounded than oligopoly narratives suggest. By examining publisher types across seven countries, this study demonstrates that universities, learned societies, and research institutions remain central actors. It is important to note that these findings are based on journal-level analyses of national publishing ecosystems and should not be interpreted as direct representations of global publishing structures or article-level dynamics. Recognizing this diversity is essential for fairer evaluation systems and for strengthening academic autonomy in the face of growing commercial concentration.

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